JUNE 1989

OREGON LABOR TRENDS

State of Oregon • Employment Division • Department of Human Resources

INDICATORS

UNEMPLOYMENT RATE

Oregon (Seas. Adj.)

May	1989	5.3
Apr.	1989	5.4
May	1988	6.1

United States (Seas. Adj.)

May	1989	5.2
Apr.	1989	5.3
May	1988	5.6

WAGE AND SALARY EMPLOYMENT INDEX

Oregon (1977 = 100)

May	1989	127.0
Apr.	1989	126.8
Mar.	1989	126.9
Feb.	1989	126.4
Jan.	1989	126.5

PRODUCTION WORKER AVERAGE HOURLY EARNINGS

Oregon

Apr.	1989	$10.84
Mar.	1989	$10.83
Apr.	1988	$10.75

PRODUCTION WORKER AVERAGE WEEKLY HOURS

Oregon

Apr.	1989	40.5
Mar.	1989	39.4
Apr.	1988	39.9

CONSUMER PRICE INDEX (CPI)

1982-84 = 100
ALL URBAN CONSUMERS

Portland-Vancouver	
July-Dec. 1988	115.9
Yearly change	3.6%
Annual Average 1988	114.7
Yearly change	3.4%
United States	
May 1989	123.8
Yearly change	5.4%
Annual Average 1988	118.3
Yearly change	4.1%

Portland Hotline 221-4132

"ON THE OTHER HAND . . ."

Duane Ackerson

While digging for information for this article, I unearthed a fifty year old time capsule in my back yard. It was, among other things, a reminder of the fact that a mere fifty years ago, people optimistically assumed there would be a future, even if, in regard to the past, Henry Ford had provided the final word: "history is bunk." Now, I suspect, our thoughts about our future might be buried like the somewhat suspect past contained in cannisters labelled "Radioactive Waste," and buried as unobtrusively as possible somewhere where they hopefully would not be found before their time and cause embarrassment.

I suspect it's quite possible that this capsule was buried as part of the activities surrounding the New York World's Fair in 1939. After that, it may have slipped into a branch of the network of underground waterways, that blood stream of sorts that honeycombs our nation, carrying nuclear waste here and Indian artifacts there, and finally lodged itself, like a blood clot, in the heart of Oregon.

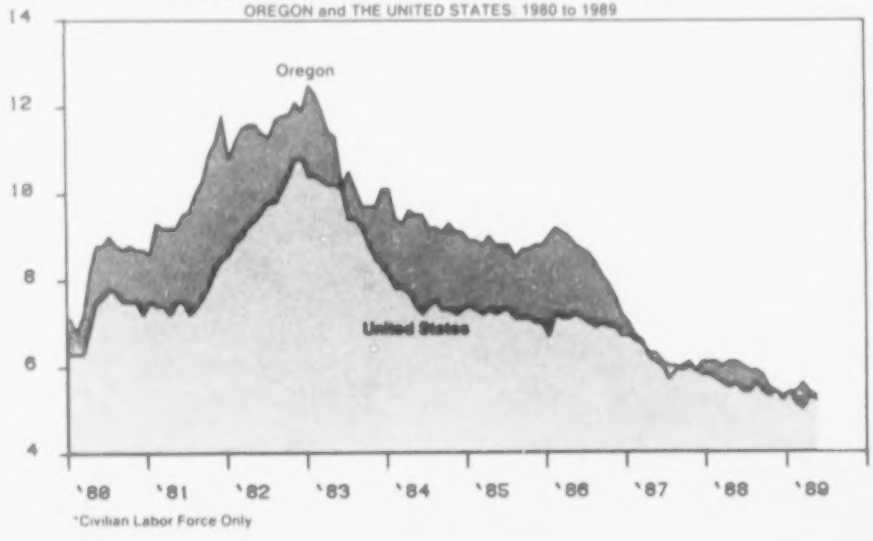
The message on the outside of this metal container was "Do not open until June 1989." Since the time was ripe, I pulled at the outside latch, one very much like the sort of latches on briefcases and beer kegs, and the container opened, revealing several reams of paper obviously prepared on a manual typewriter by a typist of mediocre ability, and placed in black binders identified by subject. One particularly thick folder was labeled "Labor Force Predictions, May 1989." I looked inside.

The predictions for the May now just past were for the nation and all the (then) forty-eight states. Naturally, I gravitated toward the Oregon section, and read:

"May 1989 was a fairly good month for Oregon, one in which the various indicators moved in positive directions. The seasonally adjusted unemployment

SEASONALLY ADJUSTED UNEMPLOYMENT RATES*

OREGON and THE UNITED STATES: 1980 to 1989



*Civilian Labor Force Only

rate went down 0.1 of a point from April, reaching 5.3%. The total number of Oregonians employed reached 1,376,300; this was 1,900 higher than in April, and over sixty thousand more than were employed in May of 1988. The total number of unemployed Oregon residents was 75,800, down 6,000 from April. The resulting May total for the civilian labor force in Oregon, the sum of total employed and total unemployed, was 1,452,100. The non-agricultural wage and salary employment index, at 127.0, was up by 0.2. The latter rose because the number of payroll jobs in May were a bit higher (+1,500) than expected for this time of year. Nonfarm payroll employment reached 1,192,500. This was 12,600 more than in April and 45,900 higher than in May 1988. This increase in the payroll level was 23.3 percent, or 225,400, higher than the worst May of the 1980-82 recession, May 1982. It was also a jump of 13.7 percent, or an increase of 143,500, from the pre-recession high of 1,049,000 in May of 1979.

"Total manufacturing employment, 210,900, was 1,300 more than in April, but, on a seasonally adjusted basis, declined by 1,800, since it was expected to grow in May by 3,100. Other than in logging, most parts of the lumber industry remained stable in May, despite the furor over spotted owls, log exports, and impending timber summits. Logging, with a seasonal increase of 1,000 jobs, changed fairly substantially, and lumber and wood products will benefit next month from the end of a labor dispute that will return an additional 3,000 jobs to June employment. Fabricated metal employment was down by 800 to 11,200 due to the end of a module construction project. In the rest of manufacturing, stability was the rule, with employment levels remaining unchanged or only deviating by plus or minus 100 jobs.

"Total nonmanufacturing employment increased by 11,300 over the month, or 3,300 above seasonal expectations. Within nonmanufacturing, construction employment was at 43,500, an increase of 4,300, or 11%, above a year ago, and an increase of 1,800 over the month before. This was the best May since 1980, with road building contributing most heavily to the high job level construction reached. Services grew 2,200 in May, a time when no increase was anticipated; this present level of 274,500 is 16,800 above that for May 1988. Tourism and recreation-related industries should be growing in the next few months as the summer comes in; many of these industries are already doing quite well, especially eating and drinking places, which, with 82,800 employed, is at its highest level ever for this or any other month or year. Hotels and other lodging places equaled the May level for last year, itself a high, and amusement and recreation employment achieved, at 9,600, the best May level ever. Business services' current level of 50,200 (+1,200) is an indication that this part of the economy is picking up. This industry is made up of twenty-five varieties of service to businesses, including temporary help agencies, building maintenance, management/public relations consultants, and protective services.

"The U.S. seasonally adjusted unemployment rate in May, at 5.2%, tracked closely with Oregon's seasonally adjusted unemployment rate, also declining 0.1 point from April's rate."

This was amazing! The writer had been right on target with every prediction; in fact, he had not only hit the target each time but the bull's-eye as well! I had to see if the other forecasts involving other aspects of our experience were as supernaturally astute. I discovered one rather thin folder entitled: "General Forecast for Life in the United States, 1989." Settling back in my chair, I began to read.

"By 1989, . . . any family of any means will have its own personal autogyro.

"By 1989, man will still not have reached the moon. The autogyro* will have achieved the sort of economical production the family car did with Henry Ford, and any family of any means will have its own personal autogyro. Most homes will come equipped, as standard features, with robot maids and butlers. The abundance of such labor-saving devices, both in the factory and the home, will result in an average work-week of twenty hours. Genetic engineering will be perfected to the point where people equipped with gills will be able to commute from work to domes under the sea, cutting down on overcrowding in countries like Japan. By 1989, after the two-term administration of a former Hollywood actor, Mickey Rooney, a woman named Georgia Quail will be elected President of the United States, defeating another ex-Hollywood star, a Ms. Doris Daze, who will run against her on an anti-vivisectionist platform of pet rights. By this time, the experiments begun by Dr. Rhine at Duke University during our time will have bourne fruit, and telepathy will be the major form of communication, resulting in the eventual breaking up, under economic pressure, of AT&T. Thanks to the perfection of telepathy and resulting improved communications, human misunderstandings, including those resulting in war and crime, will be virtually eradicated . . ."

I stopped reading at that point. After the uncanny accuracy of the labor force predictions, the general forecast was a bit of a shocker. Obviously, it was easier to predict what would happen than dictate what should have come to pass. Or, there was another possibility. I opened the last folder again, and checked the title page. Sure enough. The general predictions for the U.S. had been made by an economist.

* the name then that was the closest equivalent to our modern "helicopter". □

RESIDENT OREGON LABOR FORCE

	MAY[1] 1989	APR.[2] 1989	CHANGE	%CHANGE	MAY[3] 1988
CIVILIAN LABOR FORCE[1]	1,452,100	1,456,200	-4,100	-0.3	1,398,700
UNEMPLOYMENT	75,800	81,800	-6,000	-7.3	84,600
PERCENT OF LABOR FORCE	5.2	5.6	XXX	XXX	6.0
SEASONALLY ADJUSTED PERCENT	5.3	5.4	XXX	XXX	6.1
TOTAL EMPLOYMENT[4]	1,376,300	1,374,400	1,900	0.1	1,314,100

[1]Preliminary.
[2]Revised.
[3]Includes employed and unemployed individuals 16 years and older. Data are adjusted for multiple job holding and commuting.
[4]Includes nonagricultural wage and salary, self employed, unpaid family workers, domestics, farm workers, and labor disputants.
[5]Due to revised estimating procedures between December 1988 and January 1989, data for 1989 and that of previous years are not strictly comparable.

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT (BY PLACE OF WORK)

	MAY[1] 1989	APR.[2] 1989	MAY 1988	CHANGE FROM APR. 1989	CHANGE FROM MAY 1988
TOTAL[3]	1,192,500	1,179,900	1,146,600	12,600	45,900
WAGE & SALARY EMPLOYMENT INDEX[4]	127.0	126.8	122.0	XXX	XXX
TOTAL MANUFACTURING	210,900	209,600	211,400	1,300	-500
DURABLE GOODS	154,200	153,400	156,000	800	-1,800
LUMBER & WOOD PRODUCTS	65,100	64,100	69,000	1,000	-3,900
LOGGING & SAWMILLS	33,500	32,500	35,100	1,000	-1,600
VENEER & PLYWOOD	14,800	14,800	17,600	0	-2,800
MILLWORK & STRUCTURAL WOOD	10,800	10,800	10,300	0	500
MOBILE HOMES	1,800	1,800	1,500	0	300
OTHER WOOD PRODUCTS	4,200	4,200	4,500	0	-300
FURNITURE AND FIXTURES	2,800	2,700	2,800	100	0
STONE, CLAY, GLASS & CONCRETE	4,400	4,300	4,100	100	300
PRIMARY METALS	10,800	10,800	10,100	0	700
BLAST FURNACES, IRON & STEEL	6,400	6,400	5,900	0	500
NONFERROUS METALS	4,400	4,400	4,200	0	200
FABRICATED METALS	11,200	12,000	10,600	-800	600
FABRICATED STRUCTURAL METALS	4,700	5,500	4,400	-800	300
OTHER FABRICATED METALS	6,500	6,500	6,200	0	300
MACHINERY	18,300	18,200	17,000	100	1,300
ELECTRICAL EQUIPMENT & SUPPLIES	16,300	16,100	15,100	200	1,200
TRANSPORTATION EQUIPMENT	10,300	10,100	11,500	200	-1,200
INSTRUMENTS & RELATED PRODUCTS	11,400	11,500	12,000	-100	-600
MISCELLANEOUS MANUFACTURING	3,600	3,600	3,800	0	-200
NONDURABLE GOODS	56,700	56,200	55,400	500	1,300
FOOD & KINDRED PRODUCTS	21,600	21,100	21,400	500	200
CANNING & PRESERVING	10,100	10,000	10,300	100	-200
OTHER FOOD PRODUCTS	11,500	11,100	11,100	400	400
TEXTILE MILL PRODUCTS	1,700	1,700	1,700	0	0
APPAREL	2,600	2,600	2,700	0	-100
PAPER & ALLIED PRODUCTS	8,900	9,000	8,400	-100	500
PRINTING & PUBLISHING	13,700	13,600	13,400	100	300
CHEMICALS & ALLIED PRODUCTS	2,300	2,300	2,200	0	100
PETROLEUM REFINING	600	500	600	100	0
RUBBER & PLASTIC PRODUCTS	4,800	4,900	4,500	-100	300
LEATHER PRODUCTS	500	500	500	0	0
TOTAL NONMANUFACTURING	981,600	970,300	935,200	11,300	46,400
MINING & QUARRYING	1,500	1,400	1,300	100	200
CONSTRUCTION	43,500	41,700	39,200	1,800	4,300
TRANSPORTATION, COMMUNICATIONS, & UTILITIES	62,700	62,800	59,800	-100	2,900
TRANSPORTATION	40,800	40,900	38,300	-100	2,500
RAILROAD	3,800	3,900	3,900	-100	-100
TRUCKING & WAREHOUSING	22,400	22,400	21,500	0	900
OTHER TRANSPORTATION	14,600	14,600	12,900	0	1,700
COMMUNICATIONS	12,800	12,800	12,600	0	200
UTILITIES	9,100	9,100	8,900	0	200
TRADE	303,400	299,000	285,700	4,400	17,700
WHOLESALE TRADE	76,800	76,000	70,400	800	6,400
DURABLE GOODS	45,300	44,700	41,500	600	3,800
NONDURABLE GOODS	31,500	31,300	28,900	200	2,600
RETAIL TRADE	226,600	223,000	215,300	3,600	11,300
GENERAL MERCHANDISE	28,000	27,700	26,900	300	1,100
FOOD STORES	39,100	38,500	35,200	600	3,900
AUTO DEALERS & SERVICE STATIONS	28,100	27,700	27,900	400	200
OTHER RETAIL TRADE	131,400	129,100	125,300	2,300	6,100
FINANCE, INSURANCE, & REAL ESTATE	75,300	74,800	73,300	500	2,000
BANKING & CREDIT AGENCIES	23,500	23,400	23,800	100	-300
OTHER FINANCE, INSURANCE, & REAL ESTATE	51,800	51,400	49,500	400	2,300
SERVICES	274,500	272,300	257,700	2,200	16,800
HOTELS & PERSONAL SERVICES	28,400	28,200	27,900	200	500
HEALTH SERVICES	82,200	81,700	76,700	500	5,500
OTHER SERVICES	163,900	162,400	153,100	1,500	10,800
GOVERNMENT	220,700	218,300	218,200	2,400	2,500
FEDERAL GOVERNMENT	31,300	30,800	31,300	500	0
STATE GOVERNMENT	60,100	60,100	59,700	0	400
EDUCATION	25,400	25,400	25,500	0	-100
OTHER STATE	34,700	34,700	34,200	0	500
LOCAL GOVERNMENT	129,300	127,400	127,200	1,900	2,100
EDUCATION	82,200	81,700	81,000	500	1,200
OTHER LOCAL	47,100	45,700	46,200	1,400	900
LABOR - MANAGEMENT DISPUTES	3,600	3,800	700	-200	2,900

[1]Preliminary.
[2]Revised.
[3]Includes full and part-time nonfarm wage and salary workers in pay periods including the 12th of the month. Proprietors, self employed, private household workers and armed forces excluded. Note: Estimated in cooperation with the U.S. Bureau of Labor Statistics and Employment and Training Administration. All data are based on the 1972 Standard Industrial Classification (SIC) codes as amended by the 1977 supplement.
[4]Total nonagricultural wage and salary employment, seasonally adjusted, and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's Annual Average Employment (774,300) and that of 1977 (936,900).

A HOUSE AFIRE: THE ECONOMIC IMPACT OF THE ARTS

Duane Ackerson

Recently the Oregon Arts Commission issued its biennial report on the economic "State" of the arts. The report on the arts industry in Oregon in 1987, entitled **Cultural Equation** (Feb. 1989), was prepared for the OAC by the Western States Management Institute, a program of the Arts Council of Southern Oregon. Copies can be requested from the OAC (835 Summer St. NE, Salem, Or. 97301) or from the Western Arts Management Institute (33 North Central, Suite 308, Medford, Oregon 97501-5923).

The previous publication, **Impact: A Report on the Arts Industry in Oregon**, provides a similar discussion on characteristics and economic impact of the arts industry in 1985. This earlier report used an economic multiplier of 2.78 to compute the economic impact of the arts to be $94 million. The more recent publication states that "The Oregon Economic Development Department's Tourism Division has, through careful research, arrived at a multiplier rate of 1.94 for the state's tourism industry. The Oregon Film and Video Task Force has adopted a rate of 3.0. **Cultural Equation** takes a middle ground in adopting a rate of 2.5, slightly more conservative than the rate of 2.78 used in previous years." The report goes on to say that given the concentration of arts businesses in metropolitan areas and "regions with somewhat self-contained economies" and given the fact that the survey used covers the entire state's economy, "the multiplier rate may very well exceed 3.0, giving an economic impact in excess of $126 million."

The state tourism multiplier alluded to here is from a report, **The Economic Impact of Travel in Oregon**, prepared for the Oregon Tourism Division by Dean Runyan Associates and Dick Conway & Associates. This report estimates that in the same year of 1987, Oregon travel expenditures were almost $1.8 billion (travel expenditures for the tourism industry excluding air travel), resulting in a payroll of $319,227,000 and creating employment of 36,925. (Appendix A, "Travel-Generated Impacts, by County and Type of Business; Oregon 1987.")

Actually, the estimate of the economic impact of the arts, even at the high-end multiplier of 3.0, seems a modest one. This is partly because, while acknowledging the value of "the commercial side of esthetics and artisanship," the report basically concerns itself with the "nonprofit" art industry. **Cultural Equation**, after surveying 175 arts organizations in Oregon, concluded that "The number of people holding full-time, part-time, or contracted positions in arts groups in Oregon...was 7,108" in 1987. Arts industry revenues were estimated at $42.5 million in 1987, up 26% from $33.7 million in 1985, when a smaller sample of these organizations was surveyed. Applying the 3.0 multiplier to this $42.5 million in revenue results in the $126 million figure for the economic impact of the arts. Or, applying the more conservative 2.5 multiplier, the impact becomes $105 million.

As a percent of the almost $1.8 billion in travel expenditures associated with the tourism industry, this $126 million represents only about 7%. Is this percentage big enough? **Cultural Equation** discusses links between tourism and the arts, again citing the Oregon Division of Tourism: "...when Oregon residents travel within the state, 36.4% attend a fair or festival, while 38.7% go to a restaurant or club primarily for entertainment, often provided by Oregon musicians. While out-of-state visitors place attending a cultural or artistic event relatively low on the priority list (14.3% attend such events), we know that some regions generate much higher numbers because of such attractions as the Oregon Shakespeare Festival, Britt Music Festival, Sunriver Music Fesitival and Oregon Bach Festival, to name but a few."

If we . . . avoid the pidgeonholes it's easy to fall into when defining "the arts," we may notice that the arts in this country are going like a house afire.

The report discusses direct art spending (for example, salaries paid to actors in a theatre group) and the indirect impact of these dollars (such as money those actors might spend, out of these salaries, in the community) to arrive at its estimates (take your pick) of $105 or 126 million. Admittedly, it makes no attempt to get beyond direct and indirect economic impact to assess the effects of "induced spending". The last includes dollars spent in the course of attending a cultural event on such things as babysitters, parking, or dinner before or after the event. In trying to picture something as diverse as the arts and its total economic impact, we need to visualize some activities associated with the arts, and the audience for these activities.

If we start to look around, and avoid the pidgeonholes it's easy to fall into when defining "the arts," we may notice that the arts in this country are going like a house afire. (More about the fire later.) Around the state, more and more places for arts activities are being built: recently, these include the Portland and Newport Performing Arts Centers, to name just two.

In addition to the dual draw on tourists (both in- and out-of-state) and area residents exerted by such events as the Mt. Hood Jazz Festival, the Portland Artquake, and the Salem Art Fair, we also need to consider the fact that the arts impact some industries outside those considered under tourism, or other portions of the industries considered by the tourism study. An example might be something like the Portland or Eugene Saturday Market, or some of the establishments in the Eugene Fifth Street Market that sell artworks along with "craft" items. A survey that focuses on "art organizations" will exclude a number of possibilities. Some that come to mind: galleries that sell artwork for profit, places that market art as a community service or as an adjunct to their normal trade, whether restaurants that display local artists' paintings for sale, taverns that sponsor poetry readings and/or charge for jazz concerts, or bookstores that carry small press publications on consignment.

Such things as those mentioned above may be small taken individually, but can still have a cumulative impact. And occasionally one of these modest efforts, with or without the involvement of arts organizations, takes off. Rod McKuen's poetry was initially published by his own Stanyan Street Press, and Will Vinton is an Oregon artist who started small and graduated to Academy Awards for short subjects and to his famous troupe of all-singing, all-dancing raisins. Or, on the other hand, a small enterprise accustomed to surviving on arts endowments may find itself with a commercial "hit," such as the small press that published Harvey Fierstein's *Torch Song Trilogy* just prior to his winning the Pulitzer Prize for drama. These are extreme instances of economic success, but they do highlight some of the difficulties involved in gauging the economic impact of an industry that's all over the place. There are even portions of the arts, like literature, that straddle arts and humanities; numerous works in this area have been sponsored by the National Endowment for the Arts and/or the National Endowment for the Humanities, or by the organizations that

are their state and local level arts and humanities counterparts.

Outside of literature's unique position, the very province of artworks tends to be interdisciplinary; this is one of the few areas of our increasingly specialized modern life where the focus tends to expand rather than contract. Art wants to help us see relationships between the most unlikely things, to make great leaps along with small hops. Paradoxically, through the very ordering process, it reminds us of what a rich jumble life is. The success in the last two decades of the Arts in Education program, jointly sponsored by the National Endowment for the Arts, state arts commissions such as the Oregon Arts Commission, and regional arts councils and centers around this and other states, attests to the interdisciplinary value of the arts when teamed with education. In fact, the impact of education on the arts, and arts on education, is a whole other area ripe for further examination.

Art is intertwined with education, which itself attempts to deal with a diversity of things; it is also strongly tied to commerce. *Art in America* estimates yearly art sales in New York City of $850 million. And in Oregon? Ron Cowan, in a 1988 story in the Salem *Statesman-Journal*, reported that the 1988 Art Fair in Salem resulted in combined revenue of $404,040. The fair generated $128,800 in commission, registration, and other such income for the sponsoring Salem Art Association, money used in turn to finance nonprofit activities.

The arts are very labor-intensive; the performing arts probably more so than what Dylan Thomas called the "poet's sullen craft and art". Nonetheless, even the solitary artist can have his or her effect on the economy and the world beyond economics. As a for instance, a novelist writes a book seen as critical of Islam, and finds himself generating considerable response, including beefed-up expenditures for airport security, sales for bookstores, and lucrative copy for the news media. This impact is even more predictable in the case of the more public arts events, particularly those in the performing arts such as music, theatre, and dance. These are mixed media affairs, drawing not only on various forms of expression but also pulling together different strands of commerce.

In America, what was considered commerce at the outset has sometimes graduated to art with the passage of time, gaining even more commercial clout in the process. This is true to an extent of even the most commercial art, such as magazine ads and covers; witness the growing appreciation of commercial illustrators like Norman Rockwell, Nathaniel Wyeth, and Maxfield Parrish, and craftsmen like Louis Tiffany or the various art nouveau figures.

Beyond the appreciation of individual commercial artists, whole art forms have moved over from commerce to art. Jazz, musical theatre, and the movies are all instances of misbegotten children that have crossed to the other side of the tracks almost en masse in the course of a few decades, moving into the House of Art. In Washington, D.C. there is the American Film Institute in the Kennedy Center for the Performing Arts. In the same town, no less an institution than the Smithsonian has issued recordings attempting to "reconstruct" pre-*Oklahoma*! original cast albums as nearly as possible from individual 78 RPM records. The Smithsonian also has a similar archival series of recordings of jazz masters. And, in becoming art, these forms don't cease to be commercial as well. Witness the annual television showings of the ultimate film musical, *The Wizard of Oz*.

Even the most pragmatic dairy farmer knows cows produce more milk to Beethoven than to "headbanger" music; . . .

When movies were in their infancy, no one thought them valuable enough to worry about the fact that they had been placed on some very perishable nitrate stock. Now, major efforts are devoted to locating and restoring films that are nearly as far gone in some cases as the dodo bird. Crime movies that were originally intended as the lower berth, "B" portions of a double bill are now "cinema noir," their very graininess and low budget resourcefulness viewed as artistic pluses. These, and the cowboy features that delighted kids at matinees several decades ago, are now the subject of entire film study courses at universities.

TV, in its early period, was thought of as equally, if not more, disposable. As a result, critically lauded *Mr. Peepers* episodes faded away on cheap kinescope recordings, while its near contemporary, *I Love Lucy*, the first series to be shot on quality film stock, may survive in reruns well into the 21st century. Now, these and other shows are also permanently housed in a museum devoted to the history of television.

Musical theatre performances, live and on stage, were hardly preserved at all. When these musicals are filmed, it is seldom with performers from the original production; in fact, until the 1950's, most of the original score was usually replaced along with the cast. The original cast recording really came into being with *Oklahoma*! (1943), initially an album of 78 RPM records, and became a fixture by 1950 with the advent of the long-playing record. This is the primary means, other than through the musical "standards" of theatre composers and lyricists like Richard Rodgers, Cole Porter, Frank Loesser, Harold Arlen, Irving Berlin, Arthur Schwartz, and Stephen Sondheim, by which we know many shows now considered a valuable part of the country's musical and theatrical heritage. In addition, many of these shows still generate considerable revenue through revivals, summer stock, and little theatre performances. Some, like *Show Boat*, *Porgy and Bess*, and *Sweeney Todd*, are performed in the opera house as well, having passed through the twilight zone between "entertainment" and "the arts."

The labor-intensive value of the arts is typically undervalued. Why? Often, (with exceptions like a painting or sculpture) a concrete, tangible good is not produced. And the services provided are less "necessary" than an oil and lube job when someone's car is really in need. Also, some people persist in believing that art and commerce are like oil and water, and don't mix.

Yet, it is hard to estimate the intangible, more psychic benefits of the arts. When we move past cost benefit ratios, and beyond the need to minister to a sick engine or a crankshaft diseased, the arts may do more long-term good for our mental and physical health than a tune-up for the car or an aerobics class for the body. Even the most pragmatic dairy farmer knows cows produce more milk to Beethoven than to "headbanger" music; many a person may be suffering from a biander arts diet than our dairy cattle, and not even realize why he or she doesn't feel quite right or very productive.

The way in which we define art--whether the definition includes movies, television, musical theatre, and jazz, some of our most distinctive cultural contributions in America--says a lot about how broad an economic impact we should project for the arts, whether in Oregon or the country as whole. The arts are not just the visual and performing arts. And, though live performances are the lifeblood of the arts, performances still live, whether preserved on film, vinyl, video or magnetic tape, or merely in the memories of theatregoers fortunate enough to have seen the original *Glass Menagerie*. These fragile images, like glass animals, can be surprisingly durable; after families, memories are the first things, wrapped in photo albums, carried out of burning houses. □

EMPLOYERS' CORNER EMPLOYMENT ELIGIBILITY VERIFICATION- A NEW SERVICE TO EMPLOYERS

Al Swafford

(Editor's note: The following article is an update on the Employment Division's role regarding employment eligibility verification of job applicants. We first announced this new employer service in the February 1989 issue of **Oregon Labor Trends**.*)*

The Oregon Employment Division is now providing a new, important service to employers. As of April 10, Employment Division staff began assisting individuals who register for work to complete the U.S. Immigration and Naturalization Service's Form I-9.

The Immigration Reform and Control Act (IRCA) of 1986 requires employers to have the Form I-9 on all employees hired after November 6, 1986. IRCA says employers may hire only American citizens and aliens who are authorized to work in the United States. The I-9 is verification that the employee has presented documentation which establishes identity and employment eligibility as required by the new federal law.

The Employment Division issues I-9 certifications when an employer requests this service on job orders over three days in duration. Applicants hired on I-9 designated job orders will generate an employment certification which is mailed to the employer. The employer files the certification, which serves in lieu of the Form I-9.

The employer is saved valuable time by not having to check a new employee's documents or complete the I-9. In the case of an audit of the employer's records by the Immigration and Naturalization Service, the Employment Division is responsible for maintaining a record of the (I-9) verification of the individual's employment eligibility.

Employers wanting more information on this new employment eligibility verification service should contact any local office of the Oregon Employment Division. □

AVERAGE HOURS AND EARNINGS OF OREGON INDUSTRIAL PRODUCTION WORKERS[1]

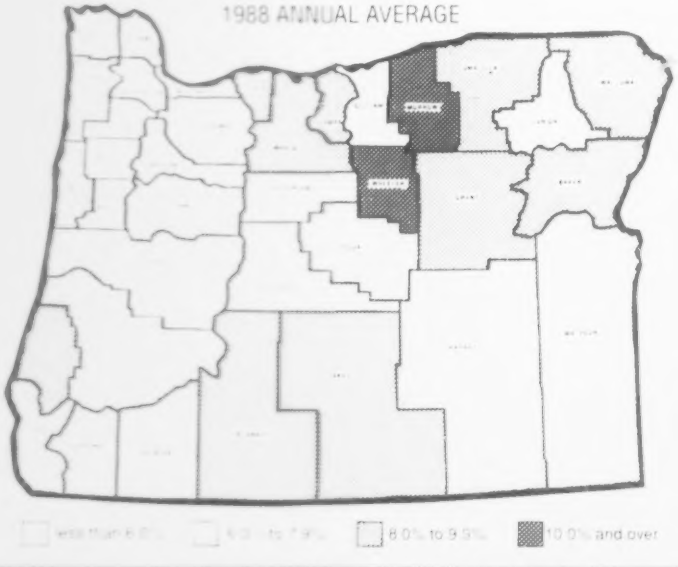
	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Apr[2] 1989	Mar[3] 1989	Apr 1988	Apr[2] 1989	Mar[3] 1989	Apr 1988	Apr[2] 1989	Mar[3] 1989	Apr 1988
TOTAL MANUFACTURING[4]	$439.02	$426.70	$428.93	40.5	39.4	39.9	$10.84	$10.83	$10.75
Durable Goods	447.58	429.66	435.11	41.1	39.6	40.4	10.89	10.85	10.77
Lumber & Wood Products	454.02	432.61	446.22	41.2	39.4	40.9	11.02	10.98	10.91
Logging & Sawmills	495.28	467.50	474.70	41.0	38.7	40.4	12.08	12.08	11.75
Veneer & Plywood	456.19	425.08	457.73	43.2	40.6	42.5	10.56	10.47	10.77
Millwork & Structural	361.60	360.19	351.92	40.0	40.2	39.9	9.04	8.96	8.82
Mobile Homes	299.79	318.79	319.74	34.9	35.5	36.5	8.59	8.98	8.76
Other Wood Products	434.28	415.44	427.61	42.0	40.1	41.8	10.34	10.36	10.23
Furniture & Fixtures	304.09	330.41	260.88	35.4	35.3	30.8	8.59	9.36	8.47
Primary Metals	520.65	523.93	498.93	43.1	43.3	41.2	12.08	12.10	12.11
Fabricated Metals	394.68	379.94	387.03	39.0	38.3	39.9	10.12	9.92	9.70
Machinery (Ex Electrical)	467.04	447.31	448.54	41.7	41.0	40.3	11.20	10.91	11.13
Nondurable Goods	413.70	414.65	411.48	38.7	38.5	38.6	10.69	10.77	10.66
Food & Kindred Products	337.64	333.79	330.99	36.9	36.4	37.4	9.15	9.17	8.85
Canning & Preserving	278.60	274.28	269.74	35.0	34.5	36.8	7.96	7.95	7.33
Other Food Products	413.31	400.79	403.39	39.4	38.5	38.2	10.49	10.41	10.56
Textile Mill Products	244.64	248.98	243.57	34.7	34.2	36.3	7.05	7.28	6.71
Apparel	256.03	248.44	234.42	38.5	37.7	36.4	6.65	6.59	6.44
Paper & Allied Products	680.51	690.24	664.22	44.8	45.5	43.3	15.19	15.17	15.34
Printing & Publishing	426.39	425.80	428.79	36.6	36.3	36.4	11.65	11.73	11.78
Construction[4]	563.26	527.78	488.23	38.5	36.1	34.7	14.63	14.62	14.07
Communications & Utilities[5]	571.72	529.60	530.47	42.1	40.0	40.9	13.58	13.24	12.97
Trade[5]	330.06	307.36	309.75	35.3	34.0	35.0	9.35	9.04	8.85
Wholesale Trade	437.86	409.05	413.70	39.2	37.7	39.4	11.17	10.85	10.50
Retail Trade	272.90	253.44	257.15	33.2	32.0	32.8	8.22	7.92	7.84
Banking & Insurance[5]	370.54	343.71	343.77	38.8	36.8	38.8	9.55	9.34	8.86
State & Local Government	384.44	377.99	367.12						

[1]Figures are average gross hours and earnings of full and part-time worked or paid for, including overtime and shift premium pay. Prepared in cooperation with the U.S. Department of Labor. All data are based on the 1972 Standard Industrial Classification (SIC) codes.
[2]Preliminary
[3]Revised
[4]Data for production workers only and exclude administrative, supervisory (above working foremen), technical, sales and office personnel.
[5]Data for nonsupervisory employees only, excluding proprietors and executive personnel. Data for retail trade excludes eating and drinking places.

UNEMPLOYMENT RATES BY AREA

Area	1988 Rank	1988	1987	1987-88 Change
United States		5.5	6.2	-0.7
Oregon		5.8	6.2	-0.4
Benton	1	3.6	3.7	-0.1
Gilliam	2	4.5	6.7	-2.2
Portland PMSA 1/	3	4.8	5.3	-0.5
Eugene MSA 2/	4	5.5	5.7	-0.2
Clatsop	5	5.8	6.6	-0.8
Salem MSA 3/	6	5.9	6.2	0.3
Curry	7	6.0	6.2	-0.2
Lincoln	8	6.2	6.7	-0.5
Jefferson	9	6.4	6.5	-0.1
Medford MSA 4/	10	6.5	6.4	0.1
Malheur	11	6.8	7.7	-0.9
Josephine	12	7.1	7.3	-0.2
Tillamook	13	7.2	8.2	-1.0
Crook	14	7.4	7.5	-0.1
Deschutes	15	7.5	7.8	-0.3
Douglas	16	7.7	7.6	0.1
Columbia	16	7.7	8.2	-0.5
Harney	16	7.7	7.8	-0.1
Linn	19	7.9	8.2	-0.3
Union	19	7.9	7.9	0.0
Wasco	21	8.0	9.0	-1.0
Lake	22	8.5	8.4	0.1
Klamath	22	8.5	8.3	0.2
Umatilla	24	8.6	9.5	-0.9
Hood River	25	8.7	8.9	-0.2
Baker	25	8.7	9.6	-0.9
Sherman	27	9.1	11.1	-2.0
Coos	28	9.3	8.2	-1.1
Wallowa	29	9.5	7.6	1.9
Grant	30	9.6	9.2	0.4
Morrow	31	11.1	14.0	-2.9
Wheeler	32	12.1	10.5	1.6

1/ Clackamas, Multnomah, Washington & Yamhill Counties
2/ Lane County
3/ Marion & Polk Counties
4/ Jackson County



NEW PUBLICATIONS

Oregon Wage Information - 1989 is designed to assist jobseekers, employers, career planners, and industrial developers seeking to attract new industry to the state. Wage data is one of the most sought after forms of labor market information. Drawing upon a wide variety of wage data sources, **Oregon Wage Information** contains wage rates for over 350 common occupations. More than 70% of all Oregonians working for wages or salaries in the private and public sectors work in these occupations.

Additionally, for comparative purposes, current and historical industry wage data are provided. It is important to consider industry wage rates because pay varies considerably between industries and for the same occupation within different industries. The main reason why average wages vary among industries is their different occupational staffing patterns.

To receive a copy of **Oregon Wage Information**, contact:

Employment Division-R&S
Attn: Susan Bell
875 Union Street NE
Salem, OR 97311
(503) 378-8657

An excellent source of information on nearly 7,000 Oregon manufacturing firms is the **Directory of Oregon Manufacturers**, published biennially by the Oregon Economic Development Department. The 1989-1990 edition, now available, is a must for marketing directors, purchasing agents, economists, sales managers, and many others who need specific information on Oregon's manufacturing companies. Information in the directory is arranged alphabetically, geographically, and by product and includes:

- company name
- address and phone number
- home office
- executives' names and titles
- products
- employment
- trade status

Copies of the **1989-1990 Directory of Oregon Manufacturers** are available at a cost of $60.

Other related reports recently published by the Oregon Economic Development Department are **Oregon-A Statistical Profile, 1988**; **County Economic Indicators, 1989**; and **Oregon's Largest Employers, 1989**.

The Statistical Profile contains basic information on key economic variables such as gross state product, population, employment, personal and per capita income, consumer price index, and international trade. Also included is an analysis of two of Oregon's primary industries, forest products and agriculture.

County Economic Indicators is a companion publication to the Statistical Profile and contains the most often requested county statistics plus a discussion of various sources of local area data.

Oregon's Largest Employers contains a listing of the largest 125 companies in Oregon, ranked by their number of employees. In addition to company name and current employment (in early 1989), this publication also lists each company's primary product or service and its parent company's name and home base city. An accompanying table showing only the state's top 10 companies contains some surprises. To obtain copies or further information on these or other related publications, please contact:

OR Economic Development Dept.
Attn: Publications
595 Cottage St. NE
Salem, Oregon 97310
or call (503)-373-1290

OREGON'S TOP 10 COMPANIES
(based on employment size)

	Product/Service	Employment
Fred Meyer, Inc.	Retail Department Stores	9,700
Tektronix, Inc.	Test & Measurement Instruments	9,000
Safeway Stores, Inc.	Grocery Stores	7,800
U.S. National Bank	National Commercial Bank	6,525
Kaiser Permanente	General Medical & Surgical Hospital	5,300
U.S. West Comm.	Telephone Communications	4,600
First Interstate Bank	National Commerical Bank	4,546
Kelly Services, Inc.	Temporary Employment Services	4,187
McDonald's Corp.	Fast Food Restaurants	4,100
Weyerhaeuser Co.	Forest Products	4,000

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